



ASET

Arizona Strategic Enterprise Technology

Digital Government: Agency Platform

Drupal 7 – Panels – Basics

Version 1.0

Executive Summary

Summary of Changes

This section records the history of significant changes to this document. Only the most significant changes are described here.

Version	Date	Author	Description of change
1.0	10/11/2016	Danielle Wilcox	Created Documentation

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Drupal 7 – Panels – Basics

General Information

Panels is a customization tool that allows developers to build layouts within their Drupal site and not having to edit a preexisting template. The module works very similar to Display Suites, however it depends on building the layout

Required Modules

Additional modules will be required for the Drupal 7 environment depending on requirements. For this guide, **Panels** and **Panel nodes** will be necessary. For further extensions of **Panels**, modules such as **Custom breadcrumbs for panels**, **Mini panels**, **Panels In-Place Editor** can be installed as well.



- **Panels** – This module provides layout functionality (both fixed and fluid) to pages on the Drupal environment in overriding the existing layout. In basic aspects, this allows the user to use the existing templates provided, but design multi column layouts, or more unique layouts that may not be setup on theme configuration.
- **Panel nodes** – Part of the Panels module. Create nodes that are divided into areas with selectable content.
- **Custom breadcrumbs for panels** – Part of the *Custom Breadcrumbs* module set, this allows to set up unique breadcrumbs if used with the rest of the site.
- **Mini Panels** – Part of the Panels module. Essentially allows site developers to create a panel like blocks that can be displayed within blocks, or within panes by other panel modules. (Think Panels inside Panels)
- **Panels In-Place Editor** – Part of the Panels module to allow an in-place editing function.

Skill Level: Beginner

- At a **Beginner** level, this guide requires some experience in the Drupal environment with creating content types.

If further customization is necessary, CSS knowledge would also be recommended knowledge to have.

The Example Scenario

Throughout the documentation, various images may contain additional captions as an example in order to provide a simple experience to the reader. This allows the reader to replicate what is shown as part of their learning process, if it is necessary.

For this scenario, the following will be referenced:

On their intranet, an agency would like to create a directory of all the top management in the agency. One of the biggest requests that communications had wanted, however, was that these should have a profile with their listing. The basic profile should have a place for a profile image, contact information, and possibly a small bio or goals for the agency.

Prerequisites to Complete

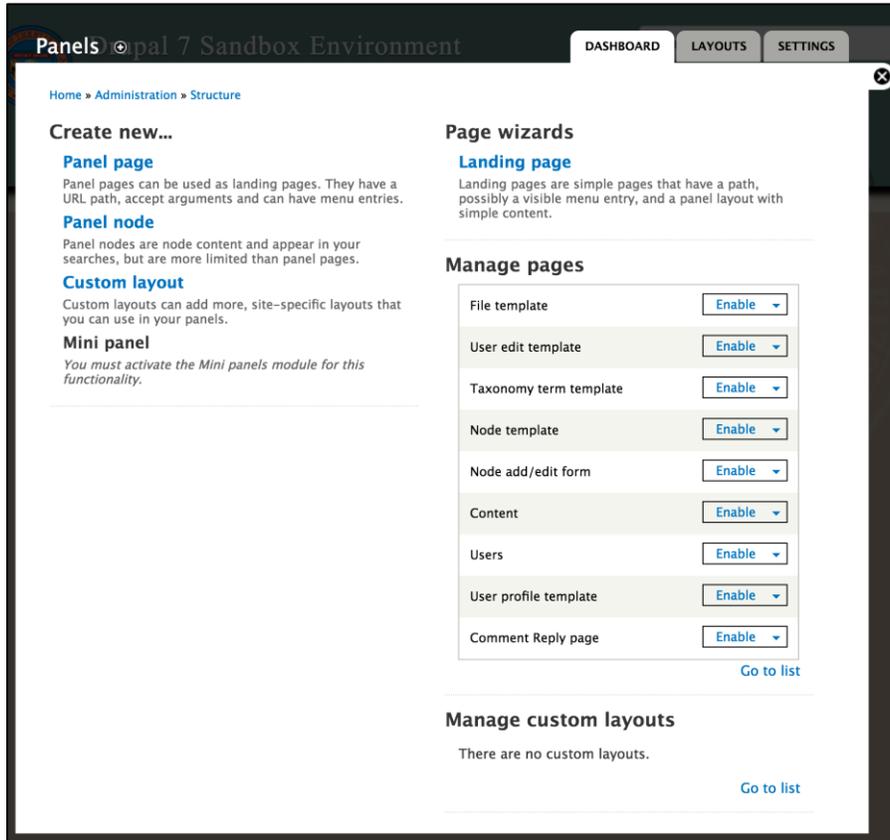
Prior to beginning this guide, it will be assumed that the below list has been created, or may be in the process of creation as you reach each section. Each item listed will be provided in generic form, but also with alignment to the example scenario in parenthesis. These can be completed within one content type, but can also expand into using referenced entities and views for maximum potential. Remember, all fields can be reused in different content types and can be found under **Add existing field** when using the *Manage Fields* section.

- A Profile Content Type has been created
 - Should contain fields for an address, quick bio, a phone number, a picture, the person's position and department.
- URL Alias patterns have been created; ideal in such that when adding custom CSS, blocks, or Panels, it makes a wild card selection very useful.
 - Pattern for Profile Content Type. (profile/[node:title])
- The following modules are installed and enabled:
 - Panels
 - Panel nodes
 - Panel In-Place Editor
 - Page Manager
- Mock up or real time profiles generated for the Profile content type.

Setting Up and Using Panels [Beginner]

Modules: Panels, Panel Nodes, Panel In-Place Editor, Page Manager

- 1) Access **Panels** configuration from the *Structure* administration menu. The opening window should consist of the *Panels Dashboard*.



- 2) Locate the *Node template* option under **Manage Pages**, and select **Enable**. This turns on panels for nodes.
- 3) Return back to the Panels configuration page, if the environment returns to the Page Manager configuration.
- 4) Select **Edit** next to the *Node template* option. Selecting this will change the screen to a summary page of all variants assigned to the node template. By default, no variants are assigned to the Node template.
- 5) Select *Add a new variant*.
- 6) Under the **Add variant** settings. Supply the following details:



- a. **Title** – this is the administrative name of this variant to make it easy to find. If it is left blank, it will automatically be assigned. The environment will not display this name elsewhere other than the Node

template settings.

- b. **Variant type** – This sets the type of Variant that the panel structure will be. By default, this should be left at Panel.
- c. **Optional Features** – This section of features will allow the user to alter or modify specific requirements for the panels to be applied in. Selection Rules will allow configuration for specific URL paths, required content items, and other basic forms of validation to select from. Contexts is more advanced for terms of validation (such as if X is of Y role, and has clicked Z). Most often, Selection Rules is typically selected.

7) Select **Create variant**.

8) Under the *Selection Rules* settings page, locate the drop down menu to select one (or additional thereafter) item to build a requirement necessary for displaying the panels.

- a. You may add as little as one, or as many as necessary to define the requirements.
- b. Selecting an item, and clicking “Add” will provide a basic configuration to define the selected item further. In most of these items, there is an option that allows the define requirement to be “reversed” or considered “is NOT”.

9) For this scenario, please select “String: URL path”. And select **Add**. This selection allows you to define a specific pathway (including wildcards) as criteria.

- a. In the prompted window, ensure **No context** is selected for *Path*.
- b. Select **Allow access on the following pages** to define only the specified URL scheme.
- c. Enter **profile/*** as the paths item.
- d. Select **Save**.

Add variant

Add a new variant to this page.

Title
Profiles Machine name: node_view_profiles
[\[Edit\]](#)
Administrative title of this variant. If you leave blank it will be automatically assigned.

Variant type
Panel

Optional features
 Selection rules
 Contexts

Check any optional features you need to be presented with forms for configuring them. If you do not check them here you will still be able to utilize these features once the new page is created. If you are not sure, leave these unchecked.

Create variant

*For this scenario, “Profiles” is declared as the title. Variant type is selected to **Panel**, and only **selection rules** is selected under optional features.*

Configure Changed

Configure a newly created variant prior to actually adding it to the page.

Before this variant can be added, it must be configured. When you are finished, click “Create variant” at the end of this wizard to add this to your page.

Selection rules » Choose layout » Panel settings » Panel content
If there is more than one variant on a page, when the page is visited each variant is given an opportunity to be displayed. Starting from the first variant and working to the last, each one tests to see if its selection rules will pass. The first variant that meets its criteria (as specified below) will be used.

TITLE	DESCRIPTION
No criteria selected, this test will pass.	

String: URL path **Add**

All criteria must pass.
 Only one criteria must pass.

Continue

10) Select the appropriate criteria requirements option (either **All criteria must pass** or **Only one criteria must pass**).

- a. For this scenario, the default of **All criteria must pass** can remain.

11) Select **Continue**.

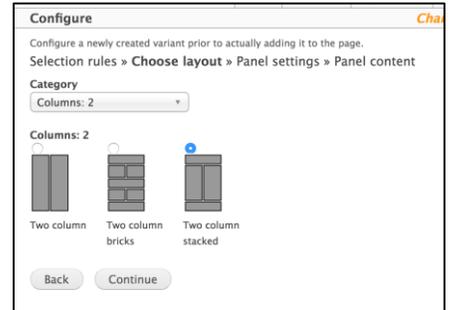
12) In the *Choose layout* configuration, select the appropriate category/layout necessary.

13) Select **Continue**.

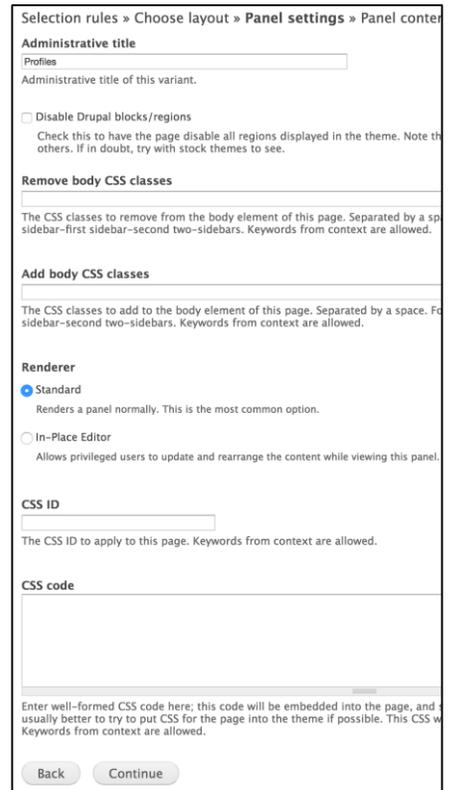
14) Under the *Panel settings* configuration page, define the following:

- a. **Administrative title** – If this is necessary to change, otherwise it will use what is defined from prior.
- b. **Disable Drupal blocks/regions** – If checked, the page regions will be disabled. Panels typically focuses using the “Content” region, otherwise, so it may be necessary to remove other defined regions on the template this way.
- c. **Remove body CSS classes** – Define any unwanted classes from the body element of the page.
- d. **Add body CSS classes** – Define any additional classes wanted for the body element.
- e. **Renderer** – Select if panels should be standard, where the panel is displayed as is and does not allow in-place editing. Or if “In-Place Editor”, if necessary to allow users to rearrange the content while viewing the panel itself.
- f. **CSS ID** – Define any additional CSS IDs to the page.
- g. **CSS Code** – Provide additional CSS code for minor adjustments.

15) Select **Continue**.



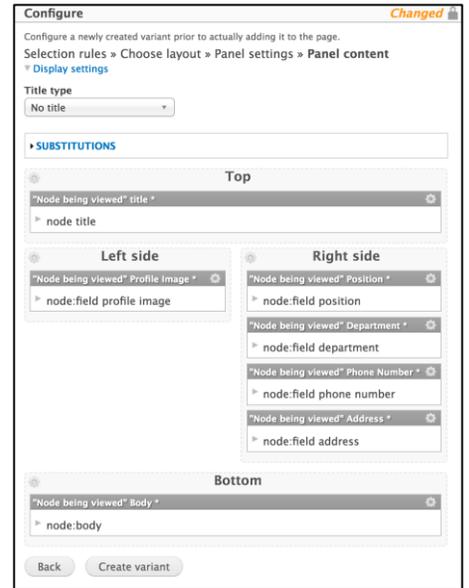
For this example, we will select “Columns: 2” from the drop down menu and select the last option of “Two column stacked”.



In this page, leave everything as empty/default.

16) Under *Panel content*, place in necessary fields, blocks, views, or other Drupal environment items necessary to each of the sections provided by the selected panel layout.

- a. **Title type** – Allows to change the page’s title to display, not display, or override all together.
- b. **The Panels** – Arrange pieces of content necessary by:
 - i. Select the gear icon on the left of the section’s header.
 - ii. Select **Add Content**.
 - iii. Locate the field, view, or other item required and select the item.
Please node, Node will hold all field based items. When selecting items, it will prompt to configure the requested item – such as to define what type of node (typically Node being viewed), override the title, CSS, or other customization options.
 - iv. Select **Finish** per item added, and add additional items necessary to the same or other panel sections.

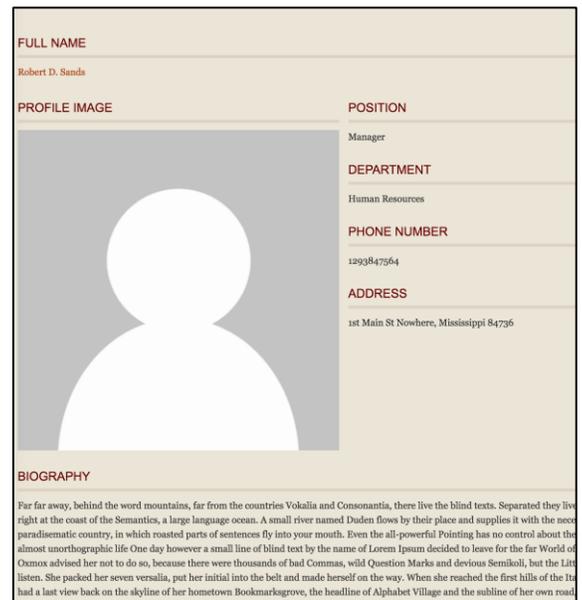


For this scenario – Add “Node:Title” to the “top” section; “field profile image” to the “left side”; the “position”, “department”, “phone number”, and “address” fields to “right side”; and the “bottom” should contain “body” (all fields located under “Node”). Leave all settings as default.

17) Select **Create variant**. The page should refresh, indicating that the page has been updated.

18) Select **Update and save**.

19) Navigate to the site page that should have received the panels look to verify the change.



Using a Custom Layout [Beginner]

Many developers wish to design their own custom layouts when using panels as the templates provided are simple basic columns, and it is very easy to do so. Panels will allow a user to define/create as many templates necessary.

- 1) Access **Panels** configuration from the *Structure* administration menu. The opening window should consist of the *Panels Dashboard*.
- 2) Select **Custom layout** from the *Create New...* list.
- 3) In the prompted window, select **Add flexible layout**.
- 4) Design the layout as necessary.
 - a. Please note that Panels defines the layouts in “rows”, “columns”, and “regions”.
 - i. A “Canvas” level can have columns.
 - ii. Columns can contain rows.
 - iii. Rows can contain regions.
 - iv. Regions contain content, and also must contain a name for the region (this name is displayed when placing content to the regions under making a panel variant).
 - b. Select “Canvas”, “Column”, “Row”, or “Region” to add another item of its type.
 - c. Each item added can be defined as a CSS class, and given an adjustable fluid or fixed width.
 - d. A defined Category will group up the custom panel layouts for selection/organization.
- 5) Select **Save**. The layout can now be chosen when creating the variants for panels.